

# *The* Advisor

Newsletter of the Teachers' Retirement System of Oklahoma

SUMMER 2025

## LEGISLATIVE UPDATE

### TRS Remains In Strong Financial Position

The first regular session of the 60th Oklahoma Legislature concluded on Friday, May 30, 2025, adjourning *sine die*. While this session was relatively quiet for the Teachers' Retirement System with no major bills directly affecting our operations or plan provisions—we have significant positive news to share about your retirement security.

**TRS achieved a strong 10.72% net investment return for FY25, significantly exceeding our 7% assumed rate of return by 3.72 percentage points.**

This achievement reflects the dedicated work of our Investment Committee, Board of Trustees, TRS staff, and consultants who are committed to prudent, long-term investment management in partnership with the Oklahoma Legislature. These results continue to benefit our members, beneficiaries, and public education throughout Oklahoma.

Thanks to these positive trends, TRS remains firmly on track to achieve full funding by 2035—if not sooner. This trajectory ensures the long-term security of your retirement benefits.

#### Dedicated Revenue Update

While TRS's overall financial health is strong, recent tax reform legislation will have a modest impact on our dedicated state revenue:

- **HB 2764 (2025)** and **HB 1955 (2024)** include tax reforms that will slightly reduce TRS's dedicated funding.
- For Fiscal Year 2026, TRS is projected to receive **\$434.3 million** in dedicated funding from state income and sales taxes.
- This represents a 3.13% decrease from the previous year, primarily due to projected decreases in state income taxes and the elimination of sales tax on groceries.

Each year, TRS receives a percentage of Oklahoma's income and sales taxes specifically designated to help pay down our unfunded liability. While this dedicated revenue will decrease slightly, the impact is manageable given our strong overall financial position.

#### Looking Ahead

Your retirement security remains our top priority. We will continue monitoring legislative developments and market conditions to ensure TRS maintains its path toward full funding by 2035. As always, we remain committed to transparent communication about your retirement system's financial health and any factors that may affect it.

For questions about your TRS benefits or account, contact our member services team or visit our [website](#) for the latest updates.





## Upcoming Retirement Planning Seminars

**Sept. 18, 2025** – High Plains Tech Center  
Woodward [Register Here](#)

**Oct. 9, 2025** – Tulsa Tech Center  
Owasso Campus [Register Here](#)

**Nov. 3, 2025** – SE OK State University  
Durant (X2) [Register Here](#)

**Dec. 5, 2025** – Western Oklahoma State University  
Altus [Register Here](#)



## Upcoming Retirement Planning Webinars

**Sept. 30, 2025** – Virtual Retirement Webinar  
[Register Here](#)

**Oct. 28, 2025** – Virtual Retirement Webinar  
[Register Here](#)

## TRS CONTACT INFO

### [MYTRS.TRS.OK.GOV](https://mytrs.trs.ok.gov)

- Start Retirement Process
- Designate Beneficiaries
- Update Tax Withholding
- View 1099-R
- Print Income Verification
- Update Contact Information

### [OKLAHOMA.GOV/TRS](https://oklahoma.gov/trs)

- [Member Handbook](#)
- [FAQs](#)
- [Retirement Webinar & Seminar Information](#)
- [Forms](#)

### LOBBY HOURS

Mon – Fri 8 a.m. to 5 p.m.

### TELEPHONE

(405) 521-2387

### INFORMATION CENTER

- (405) 521-2387 or [mail@trs.ok.gov](mailto:mail@trs.ok.gov)
- General Information
- Direct Deposit
- [MyTRS](#) Assistance

### MEMBER BENEFITS & RESOURCES

- (405) 522-1523 or [TRS.SupportServices@trs.ok.gov](mailto:TRS.SupportServices@trs.ok.gov)
- Survivor Benefits
- Withdrawals
- Post-Retirement
- Disability Retirement

### RETIREMENT PLANNING & AUDITING

- (405) 522-1533 or [TRS.Counselor.VoiceMail@trs.ok.gov](mailto:TRS.Counselor.VoiceMail@trs.ok.gov)
- Audits/Estimates
- Billings
- Retirement Finalization
- Reconciliation

### EMPLOYER SERVICES

(405) 522-3130 or [HelpDesk@trs.ok.gov](mailto:HelpDesk@trs.ok.gov)

### FINANCE

- (405) 521-4741
- Installment Payments
- Employment Payments

### COMMUNICATION & EDUCATION

(405) 521-4742



# MyTRS

## My Membership



Review your membership information, account balance, contribution history, service and salary information, and employment history.

[View Membership](#)

## My Retirement



Estimate your retirement benefit, or apply for retirement.

[Plan Retirement](#)

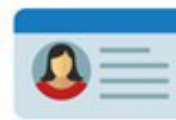
## My Beneficiaries



Update your beneficiary information.

[Update Beneficiaries](#)

## My Information



Review and update your personal, contact, and account related information.

[View My Info](#)

## Exciting Upgrades for [MyTRS](#)!

Get ready for a new [MyTRS](#) experience! We're thrilled to unveil updates that significantly enhance your access to your retirement account. Our enhanced security features have opened the door for exciting new self-service capabilities, such as applying for retirement, viewing and updating beneficiaries, accessing your 1099-Rs, and managing your tax withholdings.

The new [MyTRS](#) features a user-friendly interface with personalized "feature cards". The specific cards you see will depend on your membership status, allowing you to quickly view and update information relevant to your needs.

You can also view your Member Statements, The Advisor Newsletters, and the Popular Annual Financial Report (PAFR) electronically, ensuring you get critical updates as soon as they're released.

All users who registered prior to June 28th will have to go through the registration process for the improved [MyTRS](#). We highly recommend setting up your account with a personal email.

### Teachers' Retirement System

301 NW 63rd Street, Suite 500  
Oklahoma City, OK 73116-7921

### Mailing Address

P.O. BOX 53524  
Oklahoma City, OK 73152



## CALENDAR REMINDERS

Check our website for up-to date information on seminars and other event notices.

TRS [Retirement Planning Seminars](#)

## SEPTEMBER

**1** Labor Day Holiday – TRS Offices Closed

## NOVEMBER

**27-28** Thanksgiving Holiday – TRS Offices Closed

## DECEMBER

**24-25** Christmas Holiday – TRS Offices Closed

Member Statements published and emailed  
ACFR & PAFR Publication





# The Director's Corner



  
Sarah Green,  
Executive Director, TRS

## Your Retirement Benefits Remain Secure During Market Volatility

*A Message from the Executive Director of the Teachers' Retirement System of Oklahoma*

Recent market headlines may have caught your attention, so we want to address any concerns directly: ***your retirement benefits are secure and payments will continue uninterrupted.***

### ***What's Happening Now***

Global events and evolving trade policies have created stock market volatility. While these fluctuations can seem alarming, they're a normal part of market cycles that we've prepared for and successfully navigated before.

### ***How TRS is Protecting Your Future***

#### **Strategic Positioning:**

We've spent over a decade building defenses against market downturns. This disciplined approach has protected members through multiple market corrections and economic uncertainties.

#### **Strong Cash Reserves:**

We maintain substantial cash positions specifically to ensure benefit payments continue without interruption—even during extended market volatility. You can count on receiving your benefits as scheduled.

#### **Diversified Investment Strategy:**

Our portfolio spans multiple asset classes and investment types, reducing risk while positioning us for steady, long-term growth. This diversification is your shield against market turbulence.

**Long-Term Focus:** We don't chase short-term market trends. Instead, we invest with your decades-long retirement security in mind, maintaining discipline even when markets test our patience.

### ***Your Benefits Are Our Priority***

Our investment team actively monitors market conditions daily while staying true to the conservative, long-term strategy that has served Oklahoma educators for generations. We manage your retirement assets with the same care we'd want for our own families. Market volatility is temporary. Your retirement security is permanent.

---

Questions about your benefits?

Learn more through [MyTRS](#) or at [Oklahoma.gov/trs](https://oklahoma.gov/trs)



# TRS Welcomes 3 New Trustees



## Polly Christian

TRS is excited to welcome Polly Christian to the Board of Trustees! A lifelong educator, Polly spent her career at Cleveland Elementary in Norman and has held leadership roles with the Oklahoma Retired Educators Association, including State President.

In retirement, she remains active in her community, church and Rotary Club, while also cheering on the OU Sooners with family and friends.

We're grateful for Polly's passion and experience and look forward to her leadership!



## Shanci Garison

Shanci Garison began her career in education in 1993 as a pre-kindergarten teacher at Sasakwa Public School. Over the past 30+ years, she has taught a wide range of subjects and grade levels. For the past nine years, she has served as a high school English teacher at Atoka Public Schools, where she is also the district's ELA department chair, the high school academic team coach, and the advisor for the *Wampus Cat News*.

Shanci and her husband of 34 years, Greg, live on a farm in rural Atoka County, where they enjoy raising cattle, gardening, and working on woodworking projects. They have three grown children and two beloved grandchildren.



## Dr. Theodore Murray

As Deputy Chief of Staff for the Oklahoma State Department of Education, Dr. Theodore Murray is committed to advancing educational excellence across the state.

With a Doctor of Education in Curriculum, Instruction, and Assessment from Walden University, he brings both expertise and a passion for empowering educators and students alike. His extensive career spans roles as a teacher, administrator, and strategic leader, equipping him with a deep understanding of the challenges and opportunities within the education system. Dedicated to fostering meaningful change, Dr. Theodore Murray works closely with stakeholders to implement initiatives that enhance student outcomes and support the educators shaping Oklahoma's future.





## 2025 Inaugural SCC Leadership Reception



Pictured:  
Sarah Green, Executive Director;  
Erica Williams, Member Resource Specialist;  
Kylah Barrett, State Charitable Campaign Resources  
Development Account Executive;  
Rod Boles, Communication and Education Manager

## TRS COMMUNITY SPOTLIGHT Giving Back to the Community

We had a fantastic time attending the 2025 Inaugural SCC Leadership Reception and are honored to accept an award for our contributions to the Oklahoma State Charitable Campaign with @UnitedWay! 🎉

Giving back to our community is at the heart of what we do, and we're grateful to be part of such an impactful initiative. Looking forward to taking part again in 2025!

We are excited to announce that during the 2024 Oklahoma State Charitable Campaign with @United Way, we raised the most in the "Agencies with under 60 employees" category— more than double the amount of the runner-up! 🎉

The SCC is an annual unified fundraising effort that allows state employees to support their favorite charitable organizations through payroll deduction or one-time gifts. It is governed by the Oversight Committee for State Employee Charitable Contributions (OCSECC), which is made up of seven state employee appointees. After final processing, we're proud to share that we raised a total of \$11,246 to support meaningful causes! 💙👏

**TRS raised**  
**\$11,246**  
in contributions for state agencies with 1-60 employees.



TRS Staff, family, and friends

TRS staff, friends, and family helped sort and pack 423 boxes of bread to distribute to our community. The total pounds packed was 5,499, which is equivalent to **4,583 meals!** It was a good day!



TRS Staff, family, and friends

During Earth Day, our TRS staff, friends, and family were able to collect about 5 trash bags full of litter along a mile stretch of the Oklahoma River. Thank you for keeping our community beautiful!



## TRS RETIREE QUESTIONNAIRE:

*Dr. Jeanie S. Webb*

### **Name:**

Dr. Jeanie S. Webb

### **Previous TRS position:**

President of Rose State College

### **How long were you a member of TRS?**

43 years (since 1982)

### **What did you like best about your career?**

What I cherished most throughout my career was witnessing the life-changing power of education. Whether serving students at Northeastern State University or leading at Rose State College, I found my greatest joy in helping individuals—many of them first-generation college students—discover what was possible for their lives.

Being part of their journey, seeing them grow in confidence, and watching them achieve what they once thought out of reach was both humbling and deeply fulfilling. I always believed that education doesn't just open doors—it transforms lives and communities.

### **What are you most looking forward to in retirement?**

After more than four decades in higher education, I'm most looking forward to the simple but profound joy of spending uninterrupted time with my husband, Roger, our daughter, Anna Grace, and our sweet puppies. Retirement brings with it the beautiful gift of slowing down—embracing each day with gratitude and being present in the moments that matter most.

I plan to continue giving back to the community that has given so much to me, but with a new rhythm and perspective. Travel is high on my list—both across the U.S. and internationally. My first big adventure will be to Italy, and of course, Scotland—especially St. Andrews—is always calling us back as one of our favorite golf destinations in the world. And there's still so much more ahead!

### **How has TRS helped you in planning for retirement?**

TRS played an essential role in helping me prepare for retirement. The process, while exciting, can feel daunting with its many forms, timelines, and decisions. I was incredibly fortunate to be guided by Frances Jackson, whose expertise was matched by her kindness. She didn't just help me complete paperwork—she treated me with genuine care, answered every question with patience, and ensured I felt supported at every step. That kind of personalized, compassionate guidance made all the difference and reflected the very best of what TRS represents.

Retirement is a major dream, and I can't imagine making such a vital decision without the personal touch, the many workshops, phone calls, and the app that is easy to navigate. Most people don't realize how lucky we are to have a great retirement system to help us live comfortably as we discover the second chapter of our lives.

### **What advice would you provide an active member when planning for retirement?**

Start planning earlier than you think you should. Retirement isn't just a date on the calendar—it's a life transition that deserves thoughtful consideration. It's about aligning your finances, your goals, and your sense of purpose for the next chapter. Your salary and benefits are critical tools in that preparation, and understanding how they'll support your future is essential.

The more proactive you are, the more confident and smooth your journey will be. And don't hesitate to connect with TRS—there are remarkable people, like Frances, who not only guide you through the logistics but offer the compassion and support every educator deserves as they step into this new phase of life.

*Thank you!*

*We appreciate your service to  
education in Oklahoma.*



## OUR MISSION:

We collect, protect, and grow assets to provide a secure retirement income for public education employees.

## TRS BOARD OF TRUSTEES

### CHAIR

Kelsey Ardies

### VICE CHAIR

Brandon Meyer

### SECRETARY

Brandy Manek

### TRUSTEES

Kelsey Ardies  
Polly Christian  
Vernon Florence  
Shanci Garison  
Brent Haken  
Michael Kellogg  
Rick Rose  
Todd Russ  
Stephen Streeter  
Marla Tharp  
Chuck Thompson  
Ryan Walters  
Chuck Walworth

### DESIGNEES

Jordan Harvey  
Brandy Manek  
Dr. Theodore Murray  
Dr. Greg Winters

*The TRS Board of Trustees is found on our [website](#).*



## Did You Know

*Using the new and improved MyTRS you can:*

- Start the Retirement Process (Active Members)
- Update your beneficiaries (Active/Retirees)
- View and update your Federal and Oklahoma tax withholdings (Retirees/Eligible Payees)



**OKLAHOMA**  
Teachers' Retirement System

Post Office Box 53524  
Oklahoma City OK 73152-3524

## Have Questions? Need Help? Here's how you can get in touch with us:

In person: 301 NW 63rd Street, Suite 500,  
Oklahoma City, OK 73116-7921  
On the phone: 405-521-2387  
On the web: [oklahoma.gov/TRS](http://oklahoma.gov/TRS)